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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Abstract of judgment	Abstract of judgment/writs- prepare/process is captured under “Judgment, Post-judgment”. For criminal and delinquency case, tasks will include transmit to DMV	07	Judgment, Post-judgment, and Appeals-Related Activities	x	x	x	x			
Accountings (Probate)	Orders/judgment- pull file and prepare/review for conformity/process; update case management system; record due dates for accountings/investigations	07	Judgment, Post-judgment, and Appeals-Related Activities							x
Alternative Dispute Resolution (ADR) Program	If the work captured in Q5: “What task were you doing?” is associated with ADR, also check “Alternative Dispute Resolution Program” in Q 10.	Q7	Was the case processed or task performed associated with...a specialized program?	x						
Annual renewal notice	Annual renewal notices- prepare and send	01	Case Initiation and Case Processing						x	
Appeal	Appeal of case- prepare notices/update case management system/forward to judge/track remittiturs/track case through appeals process/manage exhibits	07	Judgment, Post-judgment, and Appeals-Related Activities	x	x	x	x	x	x	x
	Appeal of case-prepare prepare and audit clerk’s transcript/make corrections to record/prepare supplemental transcripts/request estimates and provide notice of cost of transcripts	07	Judgment, Post-judgment, and Appeals-Related Activities	x	x	x	x	x	x	x
Appellate division appeals- civil	Appellate division appeals-civil- small claims and limited civil cases heard in the superior court	Q3	What case type?	x						
Appellate division appeals- misdemeanor and infractions	Appellate division appeals- misdemeanor and infractions- appeals of misdemeanors and infractions heard in the superior court.	Q3	What case type?		x					
Arbitration (civil)	Mediation/arbitration- schedule, notice parties	04	Legal and Professional Judicial Support	x						
	Mediation/arbitration- generate and maintain list of eligible mediators and arbitrators/send notices of proposed mediators or arbitrators/review responses/send notice of appointment	04	Legal and Professional Judicial Support	x						
	Mediation/arbitration- pull/review file, prepare for mediation/arbitration	04	Legal and Professional Judicial Support	x						

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Arraignment- juvenile delinquency	Arraignment- reported under Initial/Detention Hearing	Q6	Is the task selected in #5 related to a hearing?				x			
Arrest warrants- not related to a specific case	Warrant processing (arrest or search warrants) - route to judge for signature/process warrant/Recall warrants.	Q1	Were you doing case processing work?							
Arrest warrants- related to a specific case	Warrant processing (arrest or search warrants) - route to judge for signature/process warrant/update case management system/FAX to law enforcement to update into CLETS/file/recall warrant.	01	Case Initiation and Case Processing		x		x	x		
Asbestos cases	Asbestos cases- Civil unlimited case type.	Q3	What case type?	x						
Assessment	Conduct intake/assessment/screening re: child custody	04	Legal and Professional Judicial Support			x				
	Prepare report, assessments	04	Legal and Professional Judicial Support						x	
Bail	Bail- posting, exoneration, forfeiture	01	Case Initiation and Case Processing		x					
Bench warrant	Bench warrants- issue/recall bench warrant; update case management system	05	Courtroom Support	x	x	x			x	
Billings	Review billings for attorneys, court reporters, interpreters, CASAs, psychotropic medications, etc.	08	Fees and Payments/ Financial Management				x	x		
	Review billings for social workers, investigators, expert witnesses, or other specialists	08	Fees and Payments/ Financial Management					x		
Briefing judges	Conference with judges and other court staff, observe hearings, conduct pre- and post-hearing briefings with judge	04	Legal and Professional Judicial Support	x	x	x	x	x	x	x
Calendar case	Set hearing date- assign case to a calendar. These are settings that do not occur in the courtroom.	02	Calendaring and Caseload Management	x	x	x	x	x	x	x
	Docket/calendar management- take roll; check in parties; call parties; swear in witnesses; schedule hearings	05	Courtroom Support	x	x	x	x	x	x	x
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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
	Schedule continuance	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Calendars	Pull/print/post calendars	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
	Index calendar for hearings on investigations and examinations	05	Courtroom Support							x
California Department of Corrections and Rehabilitation	Notice of commitment- send to California Department of Corrections and Rehabilitation (CDCR)/Department of Juvenile Justice	07	Judgment, Post-judgment, and Appeals-Related Activities				x			
	Jail/prison/hospital packet- prepare/process/send notice of commitment to CA Department of Corrections and Rehabilitation (CDCR)	07	Judgment, Post-judgment, and Appeals-Related Activities		x					
Cash Drawer (maintaining)	General administration (e.g., statistical and grant reporting, grant writing, fiscal work, maintaining cash drawer/till, local rules).	Q1	Were you doing case processing work?							
Certificate of rehabilitation and pardon	Certificate of Rehabilitation and pardon-process/review/research	07	Judgment, Post-judgment, and Appeals-Related Activities		x		x			
Child custody mediation/child custody recommending counseling	Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling, evaluation, investigation- pull file, review file, prepare	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling- conduct	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling- prepare report or recommendation, draft agreement/stipulation/proposed orders	04	Legal and Professional Judicial Support			x				
	Interview child	04	Legal and Professional Judicial Support			x				
Citation	Citation batch processing- sort mail, batch, scan, prepare notice of defect, enter into case management system	01	Case Initiation and Case Processing		x					

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Civil Harassment Restraining Order	Civil unlimited-other case type	Q3	What case type?	x						
	Civil harassment restraining order- associated tasks: review documents, obtain signature of judicial officer, certify copies, enter into CLETS.	01	Case initiation and Case Processing	x						
Clerical (Courtroom)	Clerical support- correspondence; printing or copying documents for parties; other clerical work	05	Courtroom Support	x	x	x	x	x	x	x
Clerical (General/not related to a specific case)	Clerical duties (e.g., phone and e-mail not associated with customer service, mail sorting and processing, maintenance of office equipment)	Q1	Were you doing case processing work?							
CLETS	Protective order or temporary restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing		x	x				x
	Restraining order processing- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing				x	x		
	Civil harassment restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing	x						
	Conduct criminal background check (for independent Domestic Violence Protective Act petitions)/CLETS search	01	Case Initiation and Case Processing			x				
	Warrant processing- route to judge for signature/process warrant/update case management system/transmit to law enforcement to update into CLETS/file/recall warrant	01	Case Initiation and Case Processing		x	x	x	x		
	Report to State Department of Justice, CLETS. Mental Health cases also include the language “other justice partners”.	07	Judgment, Post-Judgment, and Appeals-related Activities		x				x	
	CLETS/Private Professional Registry reviews	02	Calendaring and Caseflow Management							x
	Conduct criminal background check /CLETS search	04	Legal and Professional Judicial Support	x						x

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Collections	Collections - process cases for collection; refer cases to collections; mail notices; track and report on status	08	Fees and Payments/ Financial Management	x	x		x			
	Collections - process cases for dependency counsel cost recovery; refer cases to collections; mail notices; track and report on status	08	Fees and Payments/ Financial Management					x		
Complex civil cases	Complex civil- Complex cases are civil cases designated as complex civil by the judicial officer	Q7	Was the case processed...associated with...special case characteristics?	x						
Conform	Orders/judgment- pull file and prepare/review for conformity/process; update case management system	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x	x	x	x	
	Orders/judgment- pull file and prepare/review for conformity/process; update case management system; record due dates for accountings/investigations	07	Judgment, Post-judgment, and Appeals-related Activities							x
Conservatorship case type	Conservatorships are captured under probate	Q3	What case type?							x
Conservatorship investigations and examinations	Examination/investigation (regularly scheduled or specially ordered by court)/review: send notices; arrange appointments.	04	Legal and Professional Judicial Support							x
	Conduct examination- review file; review account; notify parties of deficiencies and follow-up; review objections (conservatorship, guardianship, and estates).	04	Legal and Professional Judicial Support							x
	Conduct investigation (regularly scheduled or specially ordered by court) and/or review (conservatorship and guardianship), including related travel.	04	Legal and Professional Judicial Support							x
	Examination/investigation (regularly scheduled or specially ordered by court)/review- Prepare report or notes, review and respond to e-mails regarding probate notes.	04	Legal and Professional Judicial Support							x
	Examination/investigation (regularly scheduled or specially ordered by court)/review - attend court hearing.	04	Legal and Professional Judicial Support							x

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Consolidate cases	New filing- receive/scan/create documents to start a new case; review filing for errors and reject as needed; create/prepare file; enter info into case management system; look up related cases; consolidate cases; calendar hearings for new case; file documents; accept filing fee	01	Case Initiation and Case Processing			x				
	Subsequent filing or petition - receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; look up related cases; consolidate cases; calendar hearings; file documents; accept filing fee	01	Case Initiation and Case Processing			x				
Continuance	Schedule continuance	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Copying, Copy work	Clerical support- correspondence; printing or copying documents for parties; other clerical work	05	Courtroom Support	x	x	x	x	x	x	x
	Records request- look up case information; make copy of a record; redact; certify; make prior package; accept fee for document copies	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Correspondence	Clerical support- correspondence; printing or copying documents for parties; other clerical work	05	Courtroom Support	x	x	x	x	x	x	x
Court-appointed counsel	Fee waiver/dependency counsel cost recovery- review, process paperwork, route to judge for review and signature, monitor or track payment if waiver denied	01	Case Initiation and Case Processing					x		
	Process attorney/GAL appointment	01	Case Initiation and Case Processing					x		
	Process appointment of attorneys for conservatees and minors	01	Case Initiation and Case Processing							x
	Arrange for court-appointed legal counsel	04	Legal and Professional Judicial Support							x

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Criminal background check	Conduct criminal background check/CLETS search for restraining orders	01	Case Initiation and Case Processing	x						
	Conduct criminal background check (for independent Domestic Violence Protective Act petitions)/CLETS search – as part of routine case processing	01	Case Initiation and Case Processing			x				
	Conduct criminal background check (for independent Domestic Violence Protective Act petitions)/CLETS search – as part of Family Court Services processes	04	Legal and Professional Judicial Support							x
	Conduct criminal background check /CLETS search	04	Legal and Professional Judicial Support							x
Criminal Mental Health Reports (preparation of)	Prepare periodic (quarterly, annual, biannual) reports on criminal mental health	07	Judgment, Post-Judgment, and Appeals-Related Activities						x	
Custody evaluation	Custody evaluation- schedule/notice parties.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- pull file, review file, and prepare.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- make collateral contacts, obtain records (from schools, service programs, other agencies).	04	Legal and Professional Judicial Support			x				
	Custody evaluation- Conduct evaluation.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- Prepare report for judicial officer.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- Testify in court re: custody evaluation/investigation.	04	Legal and Professional Judicial Support			x				
Custody investigation	Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties.	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling, evaluation, investigation- pull file, review file, prepare.	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation-make collateral contacts, obtain records (from schools, service programs, other agencies, etc.).	04	Legal and Professional Judicial Support			x				

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	Custody evaluation/investigation- Conduct.	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation- prepare report for judicial officer.	04	Legal and Professional Judicial Support			x				
Custody orders - juvenile (processing)	Process exit/custody orders from juvenile dependency court	07	Judgment, Post-Judgment, and Appeals-Related Activities					x		
Customer Service	General assistance- provide information or other assistance (incl. by phone, mail, e-mail) not described in other tasks	10	Self Help/General Assistance/Miscellaneous	x	x	x	x	x	x	x
	General assistance- assist justice system partners with requests for documents, information for a case	10	Self Help/General Assistance/Miscellaneous	x	x	x	x	x	x	x
Data	Data and statistical reporting- tabulate and compile stats to assess case status, progress, and outcomes	10	Self Help/General Assistance/Miscellaneous	x	x	x	x	x	x	x
Death Penalty (case characteristic)	Death penalty cases are a characteristic of felony cases and should be captured in Q7: Death penalty/capital case.	Q7	Was the case processed or task performed associated with...a special case characteristics?		x					
Death Penalty (case processing)	Prepare and issue forms related to death penalty cases- notice to reporter to prepare transcripts of preliminary hearing; notice to limited jurisdiction to prepare records	01	Case Initiation and Case Processing		x					
Dependency counsel	Fee waiver/dependency counsel cost recovery- review, process paperwork, route to judge for review and signature, monitor or track payment if waiver denied	01	Case Initiation and Case Processing					x		
	Process attorney/GAL appointment	01	Case Initiation and Case Processing					x		
	Collections - process cases for dependency counsel cost recovery; refer cases to collections; mail notices; track and report on status	08	Fees and Payments/ Financial Management					x		
Deposit of wills	Receive delivery of will/lodge will with the court	01	Case Initiation and Case Processing							x
Dismissal of case	Dismissal of case- certify, review documents, update case management system	07	Judgment, Post-Judgment, and Appeals-Related Activities	x	x	x	x	x		x

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Disposition	Enter disposition information into case management system, close out case	07	Judgment, Post-Judgment, and Appeals-Related Activities	x	x	x	x	x	x	x
Disposition reporting- Juvenile matters	Disposition reporting- prepare/send notice of disposition to school district/Department of Juvenile Justice/camp/ranch/parents/Bureau of Firearms/ Dept. of Justice/RO entered into CLETS	07	Judgment, Post-Judgment, and Appeals-Related Activities				x			
Division of Juvenile Justice	Notice of commitment- send to California Department of Corrections and Rehabilitation (CDCR)/Division of Juvenile Justice	07	Judgment, Post-judgment, and Appeals-Related Activities				x			
	Disposition reporting- prepare/send notice of disposition to school district/Department of Justice/Division of Juvenile Justice/camp/ranch/parents	07	Judgment, Post-judgment, and Appeals-Related Activities				x			
DMV	Abstract of judgment/writs- prepare/process/transmit to DMV	07	Judgment, Post-Judgment, and Appeals-Related Activities		x		x			
Docket management	Docket/calendar management- take roll; check in parties; call parties; swearing in witnesses; schedule hearings	05	Courtroom Support	x	x	x	x	x	x	x
Domestic Violence Prevention Act (DVPA) Restraining Order (RO)	DVPA Restraining Orders (case type)- captured in family law in Q3: Domestic Violence Prevention Act	Q3	What case type?			x				
	Protective order or temporary restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing			x				
	Domestic violence restraining order- transmit to law enforcement, prepare service packet for sheriff/law enforcement	07	Judgment, Post-judgment and Appeals-related Activities			x				
Due dates (probate)	Orders/judgment- pull file and prepare/review for conformity/process; update case management system; record due dates for accountings/investigations	07	Judgment, Post-judgment and Appeals-related Activities							x
Elder Abuse	Elder Abuse (case type)- petition for protective order (elder or dependent adult) is captured as “Other family law petitions,” even if the court hears cases in a department other than family law	Q3	What case type?			x				

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
	Elder Abuse (processing)- Protective order or temporary restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing			x				
Electronic recording	Electronic recording- operate equipment; do read backs to clarify minutes; prepare audio record of minutes	05	Courtroom Support	x	x	x	x	x	x	x
Entry of judgment	Notice of entry of judgment or rejection of judgment- pull file and prepare/review/ process; update case management system; send out	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x				
Evaluation	Custody evaluation- schedule/notice parties.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- pull file, review file, and prepare.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- make collateral contacts, obtain records (from schools, service programs, other agencies).	04	Legal and Professional Judicial Support			x				
	Custody evaluation- Conduct evaluation.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- Prepare report for judicial officer.	04	Legal and Professional Judicial Support			x				
	Custody evaluation- Testify in court re: custody evaluation/investigation.	04	Legal and Professional Judicial Support			x				
Ex parte filings-Family and Probate	Ex parte filing- prepare/process/enter into CMS; calendar hearing.	01	Case Initiation and Case Processing			x				x
Ex parte filings- All other case types	Subsequent filing or petition- receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; look up related cases; calendar hearings; file documents; accept filing fee.	01	Case Initiation and Case Processing	x	x		x	x	x	
Ex Parte Hearing	Ex parte hearings are captured in Q6 (under different codes for different case types).	Q6	Is the task selected in #5 related to a hearing?	x	x	x	x	x	x	x

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Ex parte- Review of	Conduct examination of ex parte drop-offs (legal research of the issues)	04	Legal and Professional Judicial Support							x
Examination (aka an accounting)	Examination/investigation/review- send notices, arrange appointments.	04	Legal and Professional Judicial Support							x
	Conduct examination- review file, review account, notify parties of deficiencies and follow-up, review objections (conservatorship, guardianship, estates).	04	Legal and Professional Judicial Support							x
	Examination/investigation/review- prepare report or notes, review and respond to e-mails regarding probate notes.	04	Legal and Professional Judicial Support							x
	Examination/investigation/review-attend court hearing.	04	Legal and Professional Judicial Support							x
Exit orders - juvenile (processing)	Process exit/custody orders from juvenile dependency court	07	Judgment, Post-judgment, and Appeals-related Activities					x		
Exhibits	Exhibits and subpoenaed documents- receive, mark, and/or file, meet with records team, review exhibits lists	05	Courtroom Support	x	x	x	x	x	x	x
	Exhibits preservation, destruction	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Exoneration	Bail- posting, exoneration, forfeiture.	01	Case Initiation and Case Processing		x					
Family court services	Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling, evaluation, investigation- pull file, review file, prepare	04	Legal and Professional Judicial Support			x				
	Conduct intake/assessment/screening	04	Legal and Professional Judicial Support			x				
	Interview child	04	Legal and Professional Judicial Support			x				
	Conduct orientation/parenting classes	04	Legal and Professional Judicial Support			x				

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
	Custody evaluation/investigation- make collateral contacts, obtain records (from schools, service programs, other agencies, etc.)	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling- conduct	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation- conduct	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling- prepare report or recommendation, draft agreement/stipulation/proposed orders	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation- prepare report for judicial officer	04	Legal and Professional Judicial Support			x				
	Testify in court re: custody mediation/recommending counseling	04	Legal and Professional Judicial Support			x				
	Testify in court re: custody evaluation/investigation	04	Legal and Professional Judicial Support			x				
	Conduct criminal background check (for independent Domestic Violence Protective Act petitions)/CLETS search	04	Legal and Professional Judicial Support			x				
Family Law Facilitator- Self Help Assistance	Self-help- provide assistance in the courtroom to self-represented/pro per litigants	10	Self Help/General Assistance/Miscellaneous			x				
	Self-help- provide one-on-one assistance (incl. by phone, mail, e-mail) to self-represented/pro per litigants	10	Self Help/General Assistance/Miscellaneous			x				
	Self-help- provide assistance to self-represented/pro per litigants at workshops	10	Self Help/General Assistance/Miscellaneous			x				
	Family Law Facilitator Electronic Database (FLFED) reporting	10	Self Help/General Assistance/Miscellaneous			x				
Fee for copies (accept fees for document copies)	Records request- look up case information; make copy of a record; redact; certify; make prior package; accept fee for document copies	09	Records Management/ File Maintenance	x	x	x	x	x	x	x

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Fee waiver/denied waivers	Fee waiver- review, process waiver of filing fees, route to judge for review and signature, process petition to declare fee hearing, monitor or track fee payment if waiver denied	01	Case Initiation and Case Processing	x		x		x	x	x
Fee waiver hearings	Fee waiver hearings are captured as “Other” hearing.	Q6	Is the task selected in #5 related to hearing?	x		x		x	x	x
Fees (for filing of documents)	Fees- collect document filing fee. This task category refers to any document filing fees collected after the filing of a new filing or subsequent filing.	08	Fees and Payments/ Financial Management	x	x	x	x	x	x	x
	New filing- receive/scan/create documents to start a new case; review filing for errors and reject as needed; create/prepare file; enter info into case management system; look up related cases; consolidate cases; calendar hearings for new case; file documents; accept filing fee	01	Case Initiation and Case Processing	x		x			x	x
	Subsequent filing or petition - receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; look up related cases; consolidate cases; calendar hearings; file documents; accept filing fee	01	Case Initiation and Case Processing	x		x			x	x
File documents	File management -file documents into case files; deliver/return files to shelves	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
File preparation	File preparation- pull file, search for file, route to courtroom/other location	02	Calendaring and Casflow Management	x	x	x	x	x	x	x
	File preparation- review and prepare file for court	02	Calendaring and Casflow Management	x	x	x	x	x	x	x
Firearms reporting	Bureau of Firearms reporting	07	Judgment, Post-judgment, and Appeals-related Activities		x		x			
Fix it ticket	Notice to correct citation- enter into case management system, send notice, review for compliance	01	Case Initiation and Case Processing		x					

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Forfeiture (of bail)	Bail- posting, exoneration, forfeiture	01	Case Initiation and Case Processing		x					
Guardianship case type	Guardianship is a case type captured under probate	Q3	What case type?							x
Guardianship investigations and examinations	Examination/investigation (regularly scheduled or specially ordered by court)/review: send notices; arrange appointments.	04	Legal and Professional Judicial Support							x
	Conduct examination- review file; review account; notify parties of deficiencies and follow-up; review objections (conservatorship, guardianship, and estates).	04	Legal and Professional Judicial Support							x
	Conduct investigation (regularly scheduled or specially ordered by court) and/or review (conservatorship and guardianship), including related travel.	04	Legal and Professional Judicial Support							x
	Examination/investigation (regularly scheduled or specially ordered by court)/review- Prepare report or notes, review and respond to e-mails regarding probate notes.	04	Legal and Professional Judicial Support							x
	Examination/investigation (regularly scheduled or specially ordered by court)/review - attend court hearing.	04	Legal and Professional Judicial Support							x
Gun Violence Restraining Order (GVRO)	Gun violence restraining order- counted in civil unlimited-other (even if the court hears cases in a department other than civil). Case type 0106.	Q3	What case type?	x						
Hearings on investigations and examinations (Probate)	Attend hearings related to examinations or investigations	04	Legal and Professional Judicial Support							x
Hospital packet	Hospital packet- prepare/process	07	Judgment, Post-judgment, and Appeals-related Activities				x			
	Jail/prison/hospital packet- prepare/process/send notice of commitment to CA Dept. of Corrections and Rehabilitation (CDCR)	07	Judgment, Post-judgment, and Appeals-related Activities		x				x	
Imaging	Imaging- scan, microfilm documents for a case file	09	Records Management/ File Maintenance	x	x	x	x	x	x	x

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Immigrant status monitoring	Immigrant status monitoring should be captured as “other” in the Case Monitoring & Enforcement functional area. Be sure to specify the task as “Immigrant status monitoring”.	03	Case Monitoring & Enforcement				x	x		
Inactive case	Inactive case- research/close/purge	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
In-custody defendant (scheduling appearance)	Schedule appearance of an in-custody defendant for a hearing/trial, which includes arranging for transport where necessary.	02	Calendaring and Caseflow Management		x					
In-custody minor (scheduling appearance)	Schedule appearance of an in-custody minor for a hearing/trial, which includes arranging for transport where necessary.	02	Calendaring and Caseflow Management				x			
In-custody parent (transporting of)	Arrange for transport of in-custody parent or non-minor dependent	02	Calendaring and Caseflow Management					x		
Indian Child Welfare Act (notices)	Notices- prepare/serve/mail notices as required under California rules of court re: Indian child	01	Case Initiation and Case Processing					x		
Intake (Child custody matters)	Conduct intake/assessment/screening	04	Legal and Professional Judicial Support			x				
Interpreter	Clerical support- schedule interpreter	05	Courtroom Support	x	x	x	x	x	x	x
Interim accountings on estates	Interim accountings on estates- reported under hearing type “Other estate-or trust-related hearing.”	Q6	Is the task selected in #5 related to a hearing?							x
Interview (Conservatorships and Guardianships)	Interviews of proposed conservator, conservatee, and other interested parties are captured in Task 03: Conduct investigation (regularly scheduled or specially ordered by the court) and/or review, including travel.	04	Legal and Professional Judicial Support							x
Interview (LPS Conservatorship)	Interview proposed conservator.	04	Legal and Professional Judicial Support						x	
	Interview proposed conservatee (proposed person to be placed in a LPS conservatorship).	04	Legal and Professional Judicial Support						x	
	Interview family members or interested parties.	04	Legal and Professional Judicial Support						x	

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Interview child (Family Law)	Interview of child generally on child custody matters	04	Legal and Professional Judicial Support			x				
Investigations (Probate)	Investigations in Probate (Conservatorships and Guardianships) are captured in Task 03: Conduct investigation (regularly scheduled or specially ordered by the court) and/or review, including travel. See also Conservatorship investigations and examinations and Guardianship investigations and examinations.	04	Legal and Professional Judicial Support							x
Investigations (Family Law)	Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties.	04	Legal and Professional Judicial Support			x				
	Custody mediation/recommending counseling, evaluation, investigation- pull file, review file, prepare.	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation-make collateral contacts, obtain records (from schools, service programs, other agencies, etc.).	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation- Conduct.	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation- prepare report for judicial officer.	04	Legal and Professional Judicial Support			x				
Investigator fees	Fees- Investigator- generate bills, prepare verification of billing, collect and post payments	08	Fees and Payments/ Financial Management							x
Investigator file (create)	Investigator file- create file, review documents, update case management system, route to investigator	01	Case Initiation and Case Processing							x
Issue bench warrant	Bench warrants- issue/recall bench warrant; update case management system	05	Courtroom Support	x	x	x			x	
Issue letters	Issuance of Letters--compare with order for accuracy, check for bond (when required), issue	07	Judgment, Post-judgment, and Appeals-related Activities							x
	Process letters of Administration	07	Judgment, Post-judgment, and Appeals-related Activities						x	

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Jail packet	Jail/prison/hospital packet- prepare/process	07	Judgment, Post-judgment, and Appeals-related Activities		x				x	
Judgment processing	Order/motion/judgment- prepare; process	05	Courtroom Support	x	x	x	x	x	x	x
	Orders/judgment- pull file and prepare/review for conformity/process; update case management system. Note that the various case types will include other tasks in the list for Orders/judgment in this function area. E.g. Probate includes “record due dates for investigations/examinations” in the list of tasks.	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x	x	x		x
Jury (general/not related to a specific case)	Jury administration (summoning, conducting orientation, payroll)	Q1	Were you doing case processing work?							
Jury (activities related to a specific case)	Jury Trial- take attendance/check in jurors; sequestering; ordering food	06	Jury Management	x	x				x	x
	Voir dire- assist with jury selection, screening, questionnaire for a trial	06	Jury Management	x	x				x	x
	Preparing jury instructions	06	Jury Management	x	x				x	x
Justice system partners (general assistance)	General assistance- assist justice system partners with requests for documents, information for a case	10	Self Help/General Assistance/Miscellaneous	x	x	x	x	x	x	x
Law enforcement	Schedule appearance of a law enforcement officer for a hearing/adjudication or hearing/trial for criminal or juvenile delinquency cases.	02	Calendaring and Caseflow Management		x		x			
	Domestic violence restraining order- transmit to law enforcement, prepare service packet for sheriff/law enforcement	07	Judgment, Post-judgment, and Appeals-related Activities			x				
	Warrant processing- route to judge for signature/ process warrant/update case management system/ transmit to law enforcement to update into CLETS/file/ recall warrant	01	Case Initiation and Case Processing				x	x		
	Warrant processing (arrest or search warrants)- route to judge for signature/process warrant/update case	01	Case Initiation and Case Processing		x					

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	management system/transmit to law enforcement to update into CLETS/file/recall warrant									
Legal research	Draft tentative rulings and other legal research	04	Legal and Professional Judicial Support	x	x	x	x	x	x	x
Locating files	File preparation- pull file, search for file (or locate file), route file to courtroom/other location	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Look up related cases	Case preparation- look up related cases. Use this task if you are looking up related cases as part of managing calendaring and not as a routine task at the time of filing documents.	02	Calendaring and Caseflow Management			x	x	x		
	New filing- receive/scan/create documents to start a new case; review filing for errors and reject as needed; create/prepare file; enter info into case management system; <u>look up related cases</u> ; calendar hearings for new case; file documents; accept filing fee	01	Case Initiation and Case Processing	x	x	x	x	x	x	x
	Subsequent filing or petition - receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; <u>look up related cases</u> ; calendar hearings; file documents; accept filing fee	01	Case Initiation and Case Processing	x	x	x	x	x	x	x
Mediation- Family Law (Child custody)	Scheduling and preparing notices: Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties.	04	Legal and Professional Judicial Support			x				
	Review of file and prepare for mediation: Custody mediation/recommending counseling, evaluation, investigation- pull file, review file, prepare.	04	Legal and Professional Judicial Support			x				
	Conduct intake/assessment/screening	04	Legal and Professional Judicial Support			x				
	Interview child	04	Legal and Professional Judicial Support			x				
	Conduct orientation/parenting classes	04	Legal and Professional Judicial Support			x				

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	Conduct: Custody mediation/recommending counseling-conduct.	04	Legal and Professional Judicial Support			x				
	Agreements and Stipulations: Custody mediation/recommending counseling- prepare report or recommendation, draft agreement/stipulation/proposed orders.	04	Legal and Professional Judicial Support			x				
	Testify in court re: custody evaluation/investigation.	04	Legal and Professional Judicial Support			x				
Mediation- Family Law (Non-custody)	Schedule and notice parties: Non-custody mediation/settlement assistance- schedule, notice parties.	04	Legal and Professional Judicial Support			x				
	Mediator selection process: Non-custody mediation/settlement assistance- generate and maintain list of eligible mediators, send notices, review responses, send notice of appointment.	04	Legal and Professional Judicial Support			x				
	Full files and prepare: Non-custody mediation/settlement assistance- pull/review file, prepare.	04	Legal and Professional Judicial Support			x				
	Conduct: Non-custody mediation/settlement assistance-conduct.	04	Legal and Professional Judicial Support			x				
	Draft stipulations/agreements/etc.: Non-custody mediation/settlement assistance- prepare report, draft agreement/stipulation/proposed orders.	04	Legal and Professional Judicial Support			x				
Mediation (in case types other than Family Law)	Mediation/arbitration- schedule, notice parties	04	Legal and Professional Judicial Support	x				x		x
	Mediation/arbitration- generate and maintain list of eligible mediators/arbitrators, send notices, review responses, send notice of appointment	04	Legal and Professional Judicial Support	x				x		x
	Mediation- pull/review file, prepare for mediation, make contacts to identify issues for mediation	04	Legal and Professional Judicial Support	x				x		x
	Mediation- conduct mediation	04	Legal and Professional Judicial Support					x		x
	Mediation- prepare report	04	Legal and Professional Judicial Support					x		x

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	Mediation- make post-mediation court appearance, conduct other follow-up	04	Legal and Professional Judicial Support					x		
Medical evaluation	Case preparation- order medical/psychological/psychiatric evaluation	02	Calendaring and Caseflow Management						x	
Microfilm	Imaging- scan, microfilm documents for a case file	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Minor's Compromise (Probate)	Minor's compromise is a probate case type and is captured under Q3 "Other Probate Matters."	Q3	What case type?							x
Minute orders	Publish/post minute orders	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x			x	
Minutes	Minutes- take minutes or notes of court actions; enter into case management system	05	Courtroom Support	x	x	x	x	x	x	x
Monitoring	Monitor compliance with court orders. Some case types list additional tasks as components of monitoring.	03	Case Monitoring & Enforcement	x	x	x	x	x	x	x
	Monitoring compliance with statutes.	03	Case Monitoring & Enforcement	x						x
Motions	Order/motion/judgment- prepare; process	05	Courtroom Support	x	x	x	x	x	x	x
Motion hearings	Hearings on motions are reported in Q6. Some case types will identify these hearings as law and motion hearing and others as motion hearings.	Q6	Is the task selected in #5 related to a hearing?	x	x	x				x
New filing	New filing- receive/scan/create documents to start a new case; review filing for errors and reject as needed; create/prepare file; enter info into case management system; look up related cases; consolidate cases; calendar hearings for new case; file documents; accept filing fee. Note that some case types will include other tasks as components of processing a new filing not listed herein.	01	Case Initiation and Case Processing	x	x	x	x	x	x	x

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Notes (prepare for judicial officers)	Case preparation- prepare notes for judicial officers	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
	Prepare notes for judicial officer. These notes are substantive in nature, such as notes on investigation findings, and not general notes, such as whether all the documents for the hearing are in the file, which would be the type of notes reported under “case preparation”.	04	Legal and Professional Judicial Support						x	x
Notice of commitment	Notice of commitment- send to California Department of Corrections and Rehabilitation (CDCR)/Department of Juvenile Justice	07	Judgment, Post-judgment, and Appeals-related Activities				x			
	Jail/prison/hospital packet- prepare/process/send notice of commitment to CA Department of Corrections and Rehabilitation (CDCR)	07	Judgment, Post-judgment, and Appeals-related Activities		x				x	
Notice of disposition (delinquency)	Disposition reporting- prepare/send notice of disposition to school district/Department of Juvenile Justice/camp/ranch/parents	07	Judgment, Post-judgment, and Appeals-related Activities				x			
Notice of entry of judgment	Notice of entry of judgment or rejection of judgment- pull file and prepare/review/ process; update case management system; send out	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x				
Notice of termination	Notice of termination- prepare notice, serve documents, prepare documents	07	Judgment, Post-judgment, and Appeals-related Activities						x	
Notice parties (General)	Case preparation- notice parties and/or interested persons	02	Calendaring and Caseflow Management			x	x	x	x	x
Notice parties (Pursuant to scheduling a mediation or arbitration)	Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties.	04	Legal and Professional Judicial Support			x				
	Non-custody mediation/settlement assistance- schedule, notice parties	04	Legal and Professional Judicial Support			x				
	Mediation (or arbitration) - schedule, notice parties.	04	Legal and Professional Judicial Support	x				x		x

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Notice to correct citation	Notice to correct citation- enter into case management system, send notice, review for compliance	01	Case Initiation and Case Processing		x					
Notices (Dependency)	Notices- prepare/serve/mail other notices (other than those required regarding Indian child)	01	Case Initiation and Case Processing					x		
Notices re: Indian Child Welfare Act (Dependency)	Notices- prepare/serve/mail notices as required under California rules of court re: Indian child	01	Case Initiation and Case Processing					x		
Notifications (Criminal)	Post-judgment notifications (firearms relinquishment, firearms destruction, swabs for DNA, etc.). Tasks include: prepare notices, serve and/or mail to justice partners.	07	Judgment, Post-Judgment, and Appeals-related Activities		x					
Order, Order after hearing	Order/motion/judgment- Prepare; process.	05	Courtroom Support	x	x	x	x		x	x
	Minute orders/orders after hearing- prepare; complete Judicial Council forms; process	05	Courtroom Support					x		
	Orders/judgment- Pull file and prepare/review for conformity/process; update case management system. Note that some case types will include other tasks not listed above (e.g., Probate includes: record due dates for accountings/investigations).	07	Judgment, Post-Judgment, and Appeals-related Activities	x	x	x	x	x		x
	Draft orders after hearing	07	Judgment, Post-Judgment, and Appeals-related Activities							x
Order after hearing (Mental health)	Process orders after hearing, including sending court orders to mental health agencies.	07	Judgment, Post-Judgment, and Appeals-related Activities						x	
Order evaluations	Case preparation- order medical/psychological/psychiatric evaluation	02	Calendaring and Caseflow Management						x	
Order to show cause/motion hearings (Family Law)	OSC/Motion Hearing - DCSS	Q6	Is the task selected in #5 related to a hearing?			x				
	Request for Order (RFO)/OSC hearing – non-DCSS	Q6	Is the task selected in #5 related to a hearing?			x				

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Order to show cause/motion hearings (all other case types)	Order to show cause (OSC)/motion hearings in case types other than Family Law are captured at “Other” under Q6 for juvenile dependency, juvenile delinquency, and mental health. OSC/motion hearings for civil are captured under hearing type “Law and motion,” and for Criminal and Probate under hearing type “Motion.”	Q6	Is the task selected in #5 related to a hearing?	x	x		x	x	x	x
Orientation	Conduct orientation/parenting classes re: child custody	04	Legal and Professional Judicial Support			x				
	Provide conservatorship orientation video	10	Self Help/General Assistance/Miscellaneous							x
Parenting classes	Conduct orientation/parenting classes re: child custody	04	Legal and Professional Judicial Support			x				
Parole revocation (processing documents)	Violation/modification of supervision (probation, mandatory supervision, PRCs, parole)- receive/scan/create documents to process a violation/modification; enter into case management system	01	Case Initiation and Case Processing		x					
Parole revocation hearings	Parole revocation hearing	Q6	Is the task selected in #5 related to a hearing?		x					
Payment plan	Payment plan- set up, track payment schedule for fees, fines, restitution as applicable	08	Fees and Payments/ Financial Management	x	x	x	x	x	x	x
Payments	Payments- accept/process payments other than filing fees	08	Fees and Payments/ Financial Management	x	x	x	x	x	x	x
Prepare forms	Prepare forms for hearings	05	Courtroom Support			x				
Pretrial programs	Pretrial programs - collaborate with jail and probation to identify eligibility for pretrial release, ensure risk assessments are administered, monitor compliance with supervised release	03	Case Monitoring & Enforcement		x					
Printing documents	Clerical support- correspondence; printing or copying documents for parties; other clerical work	05	Courtroom Support	x	x	x	x	x	x	x

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Prison packet	Jail/prison/hospital packet- Prepare/process. In criminal case type, the following additional task is included: send notice of commitment to CA Department of Corrections.	07	Judgment, Post-judgment, and Appeals-related Activities		x				x	
Private Professional Registry	CLETS/Private Professional Registry reviews	02	Calendaring and Caseflow Management							x
Pro Tem	Perform pro tem functions	04	Legal and Professional Judicial Support	x	x	x	x	x	x	x
Probation Reports (review of)	Obtain and/or review reports from justice partners and/or service providers (e.g., in criminal cases include pre-sentencing or supplemental investigation reports; in delinquency include probation, treatment reports).	03	Case Monitoring & Enforcement		x		x			
Probation revocation, Probation violation (processing documents)	Violation/modification of supervision (probation, mandatory supervision, PRCs, parole)- receive/scan/create documents to process a violation/modification; enter into case management system	01	Case Initiation and Case Processing		x					
	In delinquency cases, probation violations are captured under Subsequent filings: Subsequent filing or petition - receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; look up related cases; calendar hearings; file documents	01	Case Initiation and Case Processing				x			
Probation violation and modification hearings	Violation/modification of supervision (probation, mandatory supervision, PRCs) hearings	Q6	Is the task selected in #5 related to a hearing?		x		x			
	Delinquency language: Violation of probation hearing.									
Proof of service	Subsequent filing or petition - receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; look up related cases; calendar hearings; file documents; accept filing fee	01	Case Initiation and Case Processing	x	x	x	x	x	x	x

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Protective order	Protective order or temporary restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing			x				x
	Domestic violence restraining order- transmit to law enforcement, prepare service packet for sheriff/law enforcement	07	Judgment, Post-judgment, and Appeals-related Activities			x				
	DVPA Restraining Orders- captured in family law in Q3: Domestic Violence Prevention Act	Q3	What case type?			x				
Psych evaluation	Case preparation- order medical/psychological/psychiatric evaluation	02	Calendaring and Caseload Management						x	
Psychotropic medication	Process psychotropic medication request	01	Case Initiation and Case Processing				x	x		
	Review billings for attorneys, court reporters, interpreters, CASAs, psychotropic medications, etc.	08	Fees and Payments/Financial Management				x	x		
	Hearing on psychotropic medication	Q6	Is the task selected in #5 related to a hearing?				x	x		
Pull file(s)	File preparation- pull file, search for file, route to courtroom/other location	02	Calendaring and Caseload Management	x	x	x	x	x	x	x
Purge files	Records management- moving files to and from storage; purging old files; maintaining retention schedule	09	Records Management/File Maintenance	x	x	x	x	x	x	x
Read backs	Electronic recording- operate equipment; do read backs to clarify minutes; prepare audio record of minutes	05	Courtroom Support	x	x	x	x	x	x	x
Recall bench warrant	Bench warrants- issue/recall bench warrant; update case management system	05	Courtroom Support	x	x	x			x	
Record due dates for accountings/investigations	Orders/judgment- pull file and prepare/review for conformity/process; update case management system; record due dates for accountings/investigations	07	Judgment, Post-judgment and Appeals-related Activities							x
Records management	Records management- moving files to and from storage; purging old files; maintaining retention schedule	09	Records Management/File Maintenance	x	x	x	x	x	x	x
Records request	Records request- look up case information; make copy of a record; redact; certify; make prior package; accept fee for document copies	09	Records Management/File Maintenance	x	x	x	x	x	x	x

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Records sealing	Records sealing- review request; pull file; prepare and send letter to acknowledge compliance with sealing order; route case to storage; update case management system	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Redact	Records request- look up case information; make copy of a record; redact; certify; make prior package; accept fee for document copies	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Rejection of judgment	Notice of entry of judgment or rejection of judgment- pull file and prepare/review/ process; update case management system; send out	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x				
Related case search	Case preparation- look up related cases	02	Calendaring and Caseflow Management			x	x	x		
	New filing- receive/scan/create documents to start a new case; create/prepare file; enter info into case management system; look up related cases; calendar hearings for new case. Note that some case types may list more tasks than are presented here.	01	Case Initiation and Case Processing	x	x	x	x	x	x	x
	Subsequent filing or petition - receive/scan/create documents to add to an existing case; enter into case management system; look up related cases; calendar hearings; file documents	01	Case Initiation and Case Processing	x	x	x	x	x	x	x
	Appeal of case- prepare notices/update case management system/forward to judge/track remittiturs/track case through appeals process/manage exhibits	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x	x	x	x	x
Remittiturs (track remittiturs)	Appeal of case- prepare notices/update case management system/forward to judge/track remittiturs/track case through appeals process/manage exhibits	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x	x	x	x	x
Report preparation	Custody mediation/recommending counseling- prepare report or recommendation, draft agreement/stipulation/ proposed orders	04	Legal and Professional Judicial Support			x				
	Custody evaluation/investigation- prepare report for judicial officer re: child custody	04	Legal and Professional Judicial Support			x				
	Mediation- prepare report	04	Legal and Professional Judicial Support					x		x

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
	Probate: Examination/investigation (regularly scheduled or specially ordered by court)/review- prepare report or notes, review and respond to e-mails regarding probate notes	04	Legal and Professional Judicial Support							x
	Mental Health: Prepare report, assessments	04	Legal and Professional Judicial Support						x	
	Mental Health: Reports, interview- review file, prepare and send notices	04	Legal and Professional Judicial Support						x	
Report review	Obtain and/or review reports from justice partners and/or service providers	03	Case Monitoring & Enforcement	x	x	x	x	x	x	x
Request for Order (RFO)/OSC Hearings—non-DCSS cases	Hearings on Requests for order (RFO)/orders to show cause (OSC) - non-DCSS are captured in Q6	Q6	Is the task selected in #5 related to a hearing?			x				
Research	Draft tentative rulings and perform other legal research	04	Legal and Professional Judicial Support	x	x	x	x	x	x	x
	Status conference- research case status; scheduling; document review; meet with parties to assess case status	02	Calendaring and Caseflow Management	x						
Restraining order (Case type)	Civil harassment restraining orders are counted in civil unlimited-other	Q3	What case type?	x						
	Gun violence restraining orders are counted in civil unlimited-other (even if the court hears cases in a department other than civil).	Q3	What case type?	x						
	DVPA Restraining Orders (case type)- captured in family law in Q3: Domestic Violence Prevention Act	Q3	What case type?			x				
	Elder Abuse (case type)- petition for protective order (elder or dependent adult) is captured as “Other family law petitions,” even if the court hears cases in a department other than family law	Q3	What case type?			x				

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
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Restraining order (Processing)	Protective order or temporary restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents. Note that in civil cases the restraining order is a civil harassment restraining order.	01	Case Initiation and Case Processing	x		x				x
	Restraining order processing- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents	01	Case Initiation and Case Processing				x	x		
Retention, records	Records management- moving files to and from storage; purging old files; maintaining retention schedule	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Review hearings	Dependency: Statutory review hearing (e.g., 6-, 12-, 18-month review)	Q6	Is the task selected in #5 related to a hearing?					x		
	Dependency: Status review after termination of parental rights or on long-term foster care/post permanent planning hearing (W&I §§ 366.3(a), 366.3(d))	Q6	Is the task selected in #5 related to a hearing?					x		
	Delinquency: Mandated review hearing (e.g., 6-month review, out-of-home placement review)	Q6	Is the task selected in #5 related to a hearing?				x			
	Delinquency: Non-minor dependent review hearing	Q6	Is the task selected in #5 related to a hearing?				x			
	Delinquency: Progress report, treatment review, other non-mandated review hearing	Q6	Is the task selected in #5 related to a hearing?				x			
	Probate: Investigation review hearing (first year and annual reports in conservatorship, status report hearing in guardianship)	Q6	Is the task selected in #5 related to a hearing?							x
	Probate: Accounting review hearing	Q6	Is the task selected in #5 related to a hearing?							x
	Probate: Other review hearing	Q6	Is the task selected in #5 related to a hearing?							x
Reviews (Probate)	Send notices/arrange appointments: Examination/ investigation (regularly scheduled or specially ordered by court)/review: send notices; arrange appointments	04	Legal and Professional Judicial Support							x
	Conduct investigation (regularly scheduled or specially ordered by court) and/or review (conservatorship and guardianship), including related travel	04	Legal and Professional Judicial Support							x

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
	Prepare reports and notes: Examination/investigation (regularly scheduled or specially ordered by court)/review- prepare report or notes, review and respond to e-mails regarding probate notes	04	Legal and Professional Judicial Support							x
	Attend hearing: Examination/investigation (regularly scheduled or specially ordered by court)/review - attend court hearing	04	Legal and Professional Judicial Support							x
Review institutional reports (Mental Health)	Receive and review reports from institution, hospital, mental health facility- file reports; calendar for hearing if needed	07	Judgment, Post-judgment, and Appeals-related Activities						x	
Revocable Trust aka Revocable Living Trust	Captured as a Trust in Q3.	Q3	What case type?							x
Route file	File preparation- pull file, search for file, route to courtroom/other location	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Scanning	Imaging- scan, microfilm documents for a case file	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Schedule hearing	Set hearing date- assign case to a calendar	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
	Schedule Continuance	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
	Schedule hearings: Docket/calendar management- take roll; check in parties; call parties; swear in witnesses; schedule hearings	05	Courtroom Support	x	x	x	x	x	x	x
Schedule interpreter	Clerical support- schedule interpreter	05	Courtroom Support	x	x	x	x	x	x	x
Schedule law enforcement officer	Schedule appearance of a law enforcement officer for a hearing/adjudication	02	Calendaring and Caseflow Management		x		x		x	
Schedule mediation	Mediation/arbitration- schedule, notice parties	04	Legal and Professional Judicial Support	x		x		x		x
	Family law: Custody mediation/recommending counseling, evaluation, investigation- schedule, notice parties									

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Screening	Conduct intake/assessment/screening re: child custody	04	Legal and Professional Judicial Support			x				
Sealing	Records sealing- review request; pull file; prepare and send letter to acknowledge compliance with sealing order; route case to storage; update case management system	09	Records Management/ File Maintenance	x	x	x	x	x	x	x
Search for file	File preparation- pull file, search for file, route to courtroom/other location	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Search warrants- not related to a specific case	Warrant processing (arrest or search warrants) - route to judge for signature/process warrant/Recall warrants.	Q1	Were you doing case processing work?							
Search warrants processing- related to a specific case	Warrant processing (arrest or search warrants) - route to judge for signature/process warrant/update case management system/FAX to law enforcement to update into CLETS/file/recall warrant.	01	Case Initiation and Case Processing		x		x			
Self-help	Self-help- provide assistance in the courtroom to self-represented/pro per litigants	10	Self Help/General Assistance/Miscellaneous	x		x				
	Self-help- provide one-on-one assistance (incl. by phone, mail, e-mail) to self-represented/pro per litigants	10	Self Help/General Assistance/Miscellaneous	x		x				
	Self-help- provide assistance to self-represented/pro per litigants at workshops	10	Self Help/General Assistance/Miscellaneous	x		x				
	Self-help- provide assistance (incl. phone, mail, e-mail) to self-represented/pro per litigants.	10	Self Help/General Assistance/Miscellaneous		x		x	x	x	x
Sentencing	Enter disposition or sentencing information into case management system, close out.	07	Judgment, Post-judgment and Appeals-related Activities		x					
Sequestering	Jury trial- take attendance; sequestering; ordering food	06	Jury Management	x	x				x	x
Service of process (Mental Health)	Service of process- prepare	01	Case Initiation and Case Processing						x	

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Set hearings	Set hearing date- assign case to a calendar	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
	Docket/calendar management- take roll; check in parties; call parties; swear in witnesses; schedule hearings	05	Courtroom Support	x	x	x	x	x	x	x
	Schedule continuance	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Settlement assistance (Family Law)	Scheduling: Non-custody mediation/settlement assistance- schedule, notice parties	04	Legal and Professional Judicial Support			x				
	Mediator appointment: Non-custody mediation/settlement assistance- generate and maintain list of eligible mediators, send notices, review responses, send notice of appointment	04	Legal and Professional Judicial Support			x				
	Pull file/Prepare for: Non-custody mediation/settlement assistance- pull/review file, prepare	04	Legal and Professional Judicial Support			x				
	Conduct: Non-custody mediation/settlement assistance- conduct	04	Legal and Professional Judicial Support			x				
	Reporting: Non-custody mediation/settlement assistance- prepare report, draft agreement/stipulation/ proposed orders	04	Legal and Professional Judicial Support			x				
Settlement assistance (case types other than Family Law)	Provide settlement assistance.	04	Legal and Professional Judicial Support	x	x		x	x	x	x
Settlement conference/ Pre-trial conference	Settlement conference/Pre-Trial Conference is an informal hearing or conference to assess possibility of settlement prior to a dispositional hearing. Settlement and Pre-Trial Conference are used interchangeably and are captured as a hearing in Q6: Settlement Conference.	Q6	Is the task selected in #5 related to a hearing?	x		x				x
Settlement manager	Settlement manager is a staff attorney that manages settlement conferences as part of his or her duties. Task related to this work is captured in Task 04: Provide settlement assistance.	04	Legal and Professional Judicial Support	x	x		x	x	x	x

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Key Words	Key Words Appear in Task(s):	Code ⁱ	Task Category or Survey Question	Appears in...						
				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Social service reports	Obtain and/or review reports from justice partners and/or service providers.	03	Case Monitoring & Enforcement		x	x	x	x	x	x
Special Immigrant Juvenile Status	Process orders regarding eligibility for Special Immigrant Juvenile Status	07	Judgment, Post-judgment, and Appeals-related Activities				x	x		
Special Needs Trust aka Supplemental Needs Trust	Special Needs Trust is a legal arrangement in which a person or organization manages assets for a person with a disability. You should capture these special trusts at Trusts, case type 0104 in Q3.	Q3	What case type?							x
Specialty courts	Capture whether work was associated with specialty courts such as Drug Courts, DUI Courts, Homeless or Community Courts, Reentry Courts, DV Courts, Truancy Courts, Mental Health Courts in Q7.	Q7	Was the case processed or task performed associated with a collaborative justice court, specialized program?	x	x	x	x	x	x	x
Statistical reporting	Data and statistical reporting- tabulate and compile stats to assess case status, progress, and outcomes.	10	Self Help/General Assistance/Miscellaneous	x	x	x	x	x	x	x
	Family Law Facilitator Electronic Database (FLFED) reporting	10	Self Help/General Assistance/Miscellaneous			x				
Status conference	Status conference- research case status; scheduling; document review; meet with parties to assess case status	02	Calendaring and Caseflow Management	x		x				
Subpoenaed documents	Exhibits and subpoenaed documents- receive, mark, and/or file, meet with records team, review exhibits list.	05	Courtroom Support	x	x	x	x	x	x	x
Subsequent filing	Subsequent filing or petition - receive/scan/create documents to add to an existing case; enter into case management system; look up related cases; calendar hearings; file documents	01	Case Initiation and Case Processing	x	x	x	x	x	x	x
Summoning	Summoning potential jurors cannot be associated with any one case and is, therefore, captured in Q1: Jury Administration.	Q1	Were you doing case processing work?							

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Surrogacy-related petitions	Surrogacy-related petitions are captured as “Other family law petitions” in Q3.	Q3	What case type?			x				
Swear in witnesses	Docket/calendar management- take roll; check in parties; call parties; swearing in witnesses, schedule hearings	05	Courtroom Support	x	x	x	x	x	x	x
Take roll	Docket/calendar management- take roll; check in parties; call parties; swearing in witnesses, schedule hearings	05	Courtroom Support	x	x	x	x	x	x	x
Telephonic appearances (arrange for)	Arrange for telephonic or video appearance of parties	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Tentative ruling (processing for posting)	Preparing tentative rulings to be published or posted is captured under Calendaring and Caseflow Management as: Tentative ruling- prepare, publish, post.	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Tentative ruling (Research and Draft)	Draft tentative rulings and perform other legal research.	04	Legal and Professional Judicial Support	x	x	x	x	x	x	x
Testify (Family Law)	Testify in court re: evaluation/investigation for child custody	04	Legal and Professional Judicial Support			x				
	Testify in court re: mediation for child custody	04	Legal and Professional Judicial Support			x				
Traffic citations (Processing)	Citation batch processing- sort mail, batch, scan, prepare notice of defect, enter into case management system	01	Case Initiation and Case Processing		x					
Transcript	Appeal of case- prepare and audit clerk's transcript, make corrections to record, prepare supplemental transcripts, request estimates and provide notice of cost of transcripts	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x	x	x	x	x
	Prepare and issue forms related to death penalty cases- notice to reporter to prepare transcripts of preliminary hearing; notice to limited jurisdiction to prepare records	01	Case Initiation and Case Processing		x					
	Audit reporter transcripts for pre-trial hearings in death penalty cases- review for compliance with CRC 8.144, tag pages for corrections, notify reporter of corrections, process invoices and approve payments for transcripts	05	Courtroom Support		x					

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
Transferring cases	Transfer case in or out- receive/scan/create documents to start a new case; complete notification of transfer/vacate future hearing dates/update case management system.	01	Case Initiation and Case Processing	x	x	x	x	x	x	x
Transport in-custody defendant	Schedule appearance of an in-custody defendant for a hearing/trial, which includes arranging for transport where necessary.	02	Calendaring and Caseflow Management		x					
Transport in-custody minor	Schedule appearance of an in-custody minor for a hearing/trial, which includes arranging for transport where necessary.	02	Calendaring and Caseflow Management				x			
Transport in-custody parent	Arrange for transport of in-custody parent or non-minor dependent	02	Calendaring and Caseflow Management					x		
Travel time	Traveling for conservatorship/guardianship investigations: Conduct investigation (regularly scheduled or specially ordered by the court) and/or review (conservatorship and guardianship), including related travel	04	Legal and Professional Judicial Support							x
Trial by declaration	Trial by declaration- prepare notice of decision, enter into case management system, route to judicial officer	07	Judgment, Post-judgment, and Appeals-related Activities		x					
Trust account management	Trust account management	08	Fees and Payments/ Financial Management	x	x					x
Video Appearance (arranging for)	Arrange for telephonic or video appearance of parties	02	Calendaring and Caseflow Management	x	x	x	x	x	x	x
Violation of probation (processing documents)	Violation/modification of supervision (probation, mandatory supervision, PRCs, parole)- receive/scan/create documents to process a violation/modification; enter into case management system	01	Case Initiation and Case Processing		x					
	In delinquency cases, violation of probation processing is captured in subsequent filings: receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed;	01	Case Initiation and Case Processing				x			

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				Civil	Crim	Fam Law	Juv. Del.	Juv. Dep.	Men. Hlth	Prob.
	enter into case management system; look up related cases; calendar hearings; file documents									
Violation of Probation hearing	Violation/modification of supervision (probation, mandatory supervision, PRCs) hearing is found in Q6	Q6	Is the task selected in #5 related to a hearing?		x		x			
Voir dire	Voir dire- assist with jury selection, screening, questionnaire for a trial	06	Jury Management	x	x				x	x
Warrants- not related to a specific case	Warrant processing (arrest or search warrants). These are warrants that are obtained before a case has been filed.	Q1	Were you doing case processing work?							
Warrants- related to a specific case	Tasks associated with warrant processing occurring after a case has been filed are captured in Case Initiation and Case processing: Warrant Processing- route to judge for signature/process warrant/update case management system/FAX to law enforcement to update into CLETS/file/recall warrant.	01	Case Initiation and Case Processing		x	x	x	x		
Wills (deposit of)	Receive delivery of will/lodge will with court	01	Case Initiation and Case Processing							x
	Depositing wills with the court is a case type captured in probate: "Other probate matters."	Q3	What case type?							x
Witness scheduling	Schedule appearance of a witness	02	Calendaring and Casflow Management						x	
	Schedule appearance of witnesses (such as an evaluator) for a hearing/trial	02	Calendaring and Casflow Management			x				
Workshops	Self-help- Provide assistance to self-represented/pro per litigants at workshops	10	Self Help/General Assistance/Miscellaneous	x		x				
Writs	Abstract of judgment/writs- prepare/process	07	Judgment, Post-judgment, and Appeals-related Activities	x	x	x	x			

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